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DRAFT

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SURVEY OF EUROPEAN TELEVISION

Television is now a solidly established medium of communication in Europe. Only Portugal, Greece and Yugoslavia lack operating systems or experimental stations and firm plans for future development. Transmitter and receiver manufacturers supply the equipment demands of the burgeoning industry. Sets are generally expensive, beyond the reach of the average family, but prices are rapidly declining.

Following --- British initiative, European countries are leaning toward commercial television, even in those countries where the radio systems have traditionally been State owned.

A most promising phenomenon of European television is Eurovision-- a cooperative network which is capable of broadcasting "live" programs and syndicating filmed programs to twenty million viewers in eight countries. (Britain, France, Italy, Switzerland, West Germany, Denmark, the Netherlands and Belgium).

The following is a country-by-country status report:

Austria

Despite much effort and publicity since 1953 Austrian television is still in the experimental stage. Responsibility for television is shared by the Austrian Post and Telegraph Administration and the Austrian broad-

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casting system. The price of an inexpensive TV set is from \$230 to \$270, approximately 24 to 28 weeks earnings of the "average" wage earner. Production of receivers was started before October 1954, primarily to receive German and Swiss programs. The difficulty of financing held back development of facilities. One problem is whether to use the money appropriated by the State for the establishment of a micro-wave relay system or for building transmitters. As of 1 August 1955 --- Austrian radio began to transmit a short TV text program three times a week from Vienna, Linz, Salzburg and Graz ----- Regular broadcasts cannot be expected before the end of 1956. Contrary to the practice in other European countries, Austria plans to broadcast from the start not just a few hours, but 20 hours of programs each week.

The question of Commercial television in Austria has not been resolved. There is no definite information on the number of sets.

If, as the Czechs propose, their station in Bratislava is programmed for Vienna and Eastern Austria, steps should be taken promptly to limit as far as possible its pro-communist effectiveness.

Belgium

There are four operating stations in Belgium, blanketing the country and overlapping into Holland and France. Broadcasts are in French on two stations, Flemish on the others ---.

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Belgian television is a Government monopoly on an experimental basis.

As yet there is no special tax on sets, but all purchasers who do not already pay the radio tax (radio is also a government operation) must do so when buying their set. Eurovision greatly stimulated interest in television and the number of sets in Belgium is now estimated at 40,000.

Postal authorities are weighing the introduction of commercial television along the lines of the British Independent Television Authority network.

Denmark

Currently there is one television transmitter in operation in Copenhagen, with seven more stations proposed. The State operates the station with programming emphasis on education rather than entertainment. All television sets are licensed separately from radio receivers.

With a special relay from Hamburg, Denmark has participated in Eurovision. The impact on the public was impressive, and has resulted in increased interest. Editorials in Danish newspapers marvelled that "it is possible for 20,000,000 people in Europe to view the same events at the same time, and at the time they happened". It is through Denmark that Eurovision will eventually reach Scandinavia, and hopefully, Finland.

The estimated number of sets is between 30,000 and 40,000.

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It is expected that the state-controlled Finnish Radio Company will announce at any time its intention to begin television broadcasting in the summer of 1956. Negotiations are now under way to purchase an RCA transmitter and British studio equipment. Thus Finland seems to be on the road to Western television, with eventual tie-in with Eurovision.

The picture was not always so promising. The Soviets have made a determined effort to force the Finns into accepting Soviet standards and service. A station in Tallin has been beaming programs in Finnish to Helsinki, only 35 miles across the water. Soviet receivers have been ~~to~~ *offered at sacrifice prices or for bartered timber, or presented as gifts to* Finnish officials. At this time some 5,000 Russian sets are in the customs house in Helsinki. In private conversation Finnish officials have indicated that prohibitive prices will be imposed on the Soviet sets. A very recent report, however, indicates that the government may release some of these sets (about 650 in the first release) for sale at prices lower than similar Western sets. Thus the danger of a double standard exists. And it is true that Western sets can also be modified to receive Soviet signals, but such alterations are expensive and would not likely be general.

In spite of the above the "battle" of Finnish television has been resolved in favor of the West. The release of Soviet sets has been delayed until after the announcement that Finland will have its own independent system. The Finns have quite frankly stated that they want help once their basic station

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is established. The Department of State and USIA have informed the Embassy in Helsinki that present support should be limited to program materials which can successfully compete with the Soviet station in Tallin. Once the Finns have established their own station in Helsinki, the United States is ready to aid in the expansion to a country-wide system. If the Soviets exert political pressure, or underbid in an attempt to delay a Western-oriented station, the United States would consider taking a more active role.

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France

French television is a government operation under the jurisdiction of Radiodiffusion-Television Francaise. There are seven stations in operation, three more under construction and nine proposed. It is estimated that there are over 125,000 receivers in the country, plus a large number ----- not officially registered. RTF is active in Eurovision.

At this time French television is supported by annual government appropriation rather than by direct allocation of license fees or by advertising. For this and other reasons the programs are not the best, hence the popularity of "over the border" telecasts from Belgium, Monaco and the Saar. These peripheral stations carry a large amount of advertising beamed into France. Naturally, French advertising circles are jealous of this lucrative market, which they feel belongs to them. In October 1955, it was announced that the National Press Federation is contemplating the establishment of a privately owned network. With the British showing the way, it may be assumed that commercial television will eventually be permitted by the French government with resulting improvement in program appeal and size of audience.

Receivers are still expensive. In order to reach the lower income brackets the government experimented successfully several years ago in

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Alas province with closed-circuit television. * In 100 communities receivers were set up in the local school houses and an admission fee charged.

During the day the sets were used for educational purposes. UNESCO is interested in and is developing this idea

Germany (West)

Twenty-five stations (and 17 proposed) service the German network. All transmitters carry one program of five to six hours duration on a single channel. In accordance with a 1953 agreement several different broadcasting agencies contribute to the communal program. This is financed by license fees charged for receiving sets.

The number of television licenses at present (October 1955) is 260,000 although it is expected that as many as 80,000 unlicensed sets are now in operation, especially in areas where outside antennae are not necessary. It is expected that 350,000 receivers will be manufactured in 1956--including 19,000 for export. The cost of receivers is being quickly reduced, and the public has become increasingly insistent on 17 or 21 inch screens, rather than the previous 14 inch. At a recent Trade Fair over 100 models were exhibited.

*Closed-circuit or "wired television is characterized by the use of wires directly linking receivers with the transmitter. Industrial television is an example.

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German set-manufacturers, said to be dissatisfied with the present programs, which they believe scare away large numbers of potential customers, will invest \$200,000 in a "Better TV Programs" campaign. ----- This might hasten the open commercial use of German television.

Germany is a vital part of the Eurovision complex. German telecasts are also received in several peripheral areas--Holland, Denmark, France, and ----- in nearby Scandinavia.

The problem of Soviet influence in the future will largely be centered in Berlin. At present only an insignificant experimental stations broadcasts in East Berlin, but a Television Center is now being constructed to support a powerful television station. (Investment so far is reported as about \$5,000,000.) Since the only countering station in West Berlin is a small independent one, a strong station under Western auspices is badly needed.

Great Britain

The development of television in Great Britain has gone farther than any other European country. Transmissions are multiple channel (by next year as many as eight channels will be used, including four for commercial broadcasting).

Originally a BBC monopoly, the recent inauguration of commercial programs began under the Independent Television Authority. All of England is covered, and 90 percent of Scotland. Color transmissions of an experimental nature have begun. There are 14 operating stations, three

under construction, and 4 proposed. The estimated number of sets is over 5 million. (Many of these pick up only the BBC; these are rapidly being converted to receive the ITA broadcasts as well.) The line definition is 405 lines--different from other European standards.

The British engage in a great amount of program exchange: BBC works with NBC, programs are exchanged with Canada, and other countries including USSR. England is the most important link in the Eurovision chain, originating a large amount of the programs. In September of 1955 the first converter on the permanent television link between Britain and the Continent was inaugurated, allowing network activity between Britain and countries with different standards. Thus future programs can be seen simultaneously in Britain, France, Italy, Switzerland, Western Germany, and Berlin, the Netherlands and Belgium.

In addition to the British audience, the European viewers available through the BBC is of primary interest to U. S. interests.

Iceland

While no present plans have been initiated for television by Iceland's state-owned broadcasting body, it is reasonable to assume that steps eventually may be taken in that direction. Iceland's tolerance of communists has permitted a degree of penetration of its broadcasting structure and it must be assumed that the communists will attempt to promote and

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exploit TV for their own purposes. Considering Iceland's cool attitude toward American cultural influence, the situation calls for vigilant attention and U. S. action when appropriate. Alignment with Eurovision (via film or Kinescope) would be most desirable.

Italy

Television in Italy is well advanced. Eight master stations and four relays blanket the country, with another 22 master and 44 relays planned. The present RAI (Radiotelevisione Italiana) operations consist of an average 40 hours per week over the extensive network. The government announced in February of 1955 that the network will cover Sicily and Sardinia by the end of 1956. Italy is an integral part of Eurovision, and a television appearance by the Pope on the inaugural broadcast was a dramatic event for millions of Europeans.

Present estimates of the number of sets in Italy varies between 100,000 and 200,000. The policy of commercial television has been determined; it will be begun when the number of "officially declared" receivers exceeds

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150,000. The controlling interest is held by the government, but not generally considered a strict government operation.

Owners of sets pay a yearly tax of US \$29. The average set sells for just under \$500. U. S. Sets are now being manufactured locally, with imported picture tubes.

Luxembourg

Radio Luxembourg, a private corporation operating under a concession from the Luxembourg government, began regular commercial television broadcasts this year. There are only about a hundred sets in the principality of Luxembourg. The broadcasts are in French and are aimed primarily at a potential audience of four million--in Belgium and France. (Radio Luxembourg is conducted primarily as a French station. It --- has its own television film studio in Paris).

Advertising patronage is increasing, and even some firms who have been hesitant have taken the precaution of acquiring future options on desirable program hours. Meanwhile television expenses are being borne by profits from the corporation's radio broadcasts. Until such time as the French television system goes commercial, Luxembourg will undoubtedly be an important station to France.

Time is available to all who care to buy it. Presumably all "political broadcasts" must receive prior Luxembourg Government approval, as

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has been the case with Radio broadcasts.

Monaco

The single commercial station, beaming its programs to France and Italy is owned by the same company which controls television in the Saar. Oddly enough, the antenna is owned by the French government and is leased on a yearly basis.

There are almost a million persons within the area served by the Monte Carlo station.

Netherlands

A station broadcasting on a semi-experimental basis reaches the Dutch viewer from within the Netherlands. Television is government controlled with five television associations providing programming and a tax on sets meeting part of the expense.

Television sets are manufactured locally, with some imported from West Germany. Many Dutch viewers own these sets and receive over-the-border transmissions from Germany. Program exchanges have taken place with Belgium. At the time of the Coronation temporary equipment converted the British line definition to the Dutch 625 without difficulty. The Netherlands participates in Eurovision.

Commercial television in the Netherlands seems inevitable, especially following the British initiative. A recent survey of viewers who had seen

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experimental commercial broadcasts indicates that there would be negligible public opposition. At present there are an estimated 60,000 sets.

In the event of commercial television, it is probable that the government will guarantee time to Dutch political and religious groups.

Norway

There are no definite plans for television in Norway. One tiny experimental transmitter serves the country's twelve receiving sets.

Portugal

In October of 1955 the government authorized a television corporation which hopes to be in operation by the end of 1956.

Saar

One station now operates, and there are between 7,000 and 8,000 sets in the country. Like Luxembourg, however, the important potential audience is "over the border", in West Germany and France. Operating under a franchise from the government, broadcasts are commercial.

Now under construction, and scheduled to begin transmissions at the time of writing, is a powerful station known as "Europe #1 TV". This station is owned by the group which controls the presently operating station through a complicated structure of holding companies, and there has been a great deal of discussion in the French parliament concerning its operation. It has been reported that the controlling interest of this organization is

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on the market. It now has a political obligation to broadcast a certain number of programs for the "Council of Europe". There is little doubt that this will be a powerful and important station, at least as long as French telecasting is non-commercial. But the future of the station is tied up in the future of the Saar, in the pressures that might be brought to bear by the French government and by radio and newspaper groups.

Spain

The State-owned Radio Network now operates one experimental television station in Madrid, and plans five more transmitters. There are about 1,000 sets in the country.

Sweden

The Royal Television Commission broadcasts three evenings a week on a single channel on an experimental station in Stockholm. Another station is under construction at Goeteborg and two others are proposed.

The government is now considering the recommendations of a committee studying the future of Swedish television. The committee's majority opinion suggested that the government should maintain the monopoly but dissenting members favored commercial television. At least 90 percent of Sweden will be covered if the government accepts the committee's suggestions.

There are an estimated 6,000 sets in Sweden, but the committee guesses that there will be about 800,000 sets within 14 years.

Switzerland

Switzerland has four operating stations, and eight proposed. Ownership is by the State with set owners paying yearly subscription fees. The present number of sets is estimated to be 6,000. (Almost 25 percent of these sets are in restaurants and other public places).

Public interest in television is increasing rapidly, especially since Swiss participation in Eurovision and special broadcasts of a hookup with West Germany, the Four Power Conference in Berlin was telecast to Swiss viewers. Switzerland, because of its geographical proximity to other European countries, is destined to play a large part in ----- European network development.

In 1954 the Swiss television Service ran a dozen Soviet films which had previously been shunned by the Swiss Movie Theater Association. It was said that these were the result of an exchange in films; in reality the counterpart showings in Russia were confined to a few private showings.

Because of the ease with which relay antennae can be erected on Swiss peaks, it is logical to assume that Switzerland will soon be effectively blanketed with television signals.

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Yugoslavia

The government hopes to install an experimental station by the end of this year. Even though there are no stations operating, a recent magazine article claims that there are 2,500 receivers along the Adriatic coast in Austria and the Slovenian littoral which receive programs from Italy.

Because of its proximity to Italy, Yugoslavia could easily become a member of --- Eurovision ---. It also might become, like Finland, a country where the Soviets will attempt to monopolize television development with offers of technical aid and program support. Yugoslavia, like Finland and Austria, requires prompt U. S. action.

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